Research Report

Nine Elms and Vauxhall Opportunity Area Household Research

Prepared for: Wandsworth Council

Nine Elms and Vauxhall Opportunity Area Household Research

Prepared for: Wandsworth Council

Prepared by: Steve Handley, Research Director

Date: August 2017

Produced by BMG Research

www.bmgresearch.co.uk

Project: 1227

Registered in England No. 2841970

Registered office:

BMG Research
Beech House
Greenfield Crescent
Edgbaston
Birmingham
B15 3BE
UK

Tel: +44 (0) 121 3336006

UK VAT Registration No. 580 6606 32

Birmingham Chamber of Commerce Member No. B4626

Market Research Society Company Partner

The provision of Market Research Services in accordance with ISO 20252:2012

The provision of Market Research Services in accordance with ISO 9001:2008

The International Standard for Information Security Management ISO 27001:2013

Investors in People Standard - Certificate No. WMQC 0614

Interviewer Quality Control Scheme (IQCS) Member Company

Registered under the Data Protection Act - Registration No. Z5081943

A Fair Data organisation

Cyber Essentials certification

Table of Contents

1 Introduction and methodology

1.1 Background

The Nine Elms and Vauxhall Opportunity Area (NEVOA) is an area of Wandsworth that is experiencing considerable regeneration. This is resulting in sizable additions to the borough's housing stock and therefore it's residential population. In response to this, Wandsworth Council commissioned BMG Research to deliver research to provide intelligence on the nature and composition of these new residential households. The specific objectives of this research were:

- To understand levels of occupation in new build residential development in the Nine Elms area.
- To understand levels of home ownership and renting (whether from private or registered social landlords), the number of second homes and duration of residence.
- To understand household composition in the area, including by age and nationality.
- To understand residents' perception regarding the quality of their accommodation and of the neighbourhood.
- To understand the current and likely demand for local services such as health, education and transport.

While delivering this research in the same approach was also applied to the Battersea Reach and Osiers Road area where there have also been a number of new residential developments.

1.2 Research Methodology

Wandsworth Council provided the sample frame for this research; a list of residential addresses in the two target areas. These addresses were spread across 7 developments as shown by the table below.

Table 1: Research sample frame

Area	Development	Number of properties
Nine Elms	334 Queenstown Road	95
Nine Elms	Chelsea Bridge Wharf	1115
Nine Elms	Embassy Gardens	308
Nine Elms	Riverlight	555
Nine Elms	Viridian Apartments	240
Outside Nine Elms	Battersea Reach	798
Outside Nine Elms	Osiers Road	850
Total		**3961**

All 3,961 addresses were sent a Council branded postal questionnaire in mid-April explaining the nature of the research and the requesting information about the inhabitants of that address. All addresses from which a postal survey was not returned were then sent a follow up survey three weeks later in order to maximise the response rate. The postal phase of the survey produced a notably lower response rate (10%) than normally seen in postal research. The norm in Council related postal research is between 25% and 30%. It is possible that that the high value addresses covered by this research, have a lower level of occupancy, to the detriment of the response rate. However, BMG Research has no firm evidence to support this hypothesis.

The postal research phase was followed by a face to face interviewing element whereby a team of BMG interviewers were deployed on the ground to visit the address from which no responses had been received. Interviewing targets were set at a development level, taking into account the volume of surveys returned during the postal phase. The targets set were calculated to ensure a representative spread of interviews across each development once the postal and face to face data sets were combined.

When the interviewing team encountered gatekeepers that limited their access, i.e. concierges in the Nine Elms developments, this was referred back to the project team at BMG Research for action. Development management were written to and spoken to in order to provide assurance about the legitimacy of the research and that participation was voluntary. In most instances this resulted in the interviewing teams being provided with the required access to the target addresses. The exception to this was the Embassy Gardens development for which, despite repeated requests and input from Council representatives, access was denied. On this basis, the interviews required for this development were spread around the remaining Nine Elms developments. The full breakdown of surveys received/achieved was as follows:

Table 2: Survey completion by development

Development	Postal Completes	F2F Completes	Total
334 Queenstown Road	1	11	12
Chelsea Bridge Wharf	109	143	252
Embassy Gardens	27	1	28
Riverlight	37	97	134
Viridian Apartments	37	24	61
Battersea Reach	92	96	188
Osiers Road	140	58	198
Total	**443**	**430**	**873**

Face to face interviewing was completed in early July 2017, once it had been confirmed that no access to Embassy Gardens would be granted.

1.3 Weighting

As the rate of response varied between developments, the responses have been weighted to remove any bias that may arise from this, in line with standard statistical practice. The weighing applied is based on the number of unique properties per development as per the table below.

Table 3: Data weighting

Area	Development	%
Nine Elms	334 Queenstown Road	2%
Nine Elms	Chelsea Bridge Wharf	28%
Nine Elms	Embassy Gardens	8%
Nine Elms	Riverlight	14%
Nine Elms	Viridian Apartments	6%
Outside Nine Elms	Battersea Reach	20%
Outside Nine Elms	Osiers Road	21%

1.4 Reporting

The results of this research are provided at a total sample level (all addresses in these new development areas), as well as individually for the Nine Elms area and the addresses outside of the Nine Elms development.

For questions that asked individuals to provide information about their household on and individual by individual basis, the sample base used is the total number of individuals for which information has been provided, rather than the number of survey returns (households). This approach allows conclusions to be drawn about the composition of the resident populations in the areas of focus.

When all respondents answered the questions, the total number of responses given was 873 for household questions, and 1,674 for individual questions.

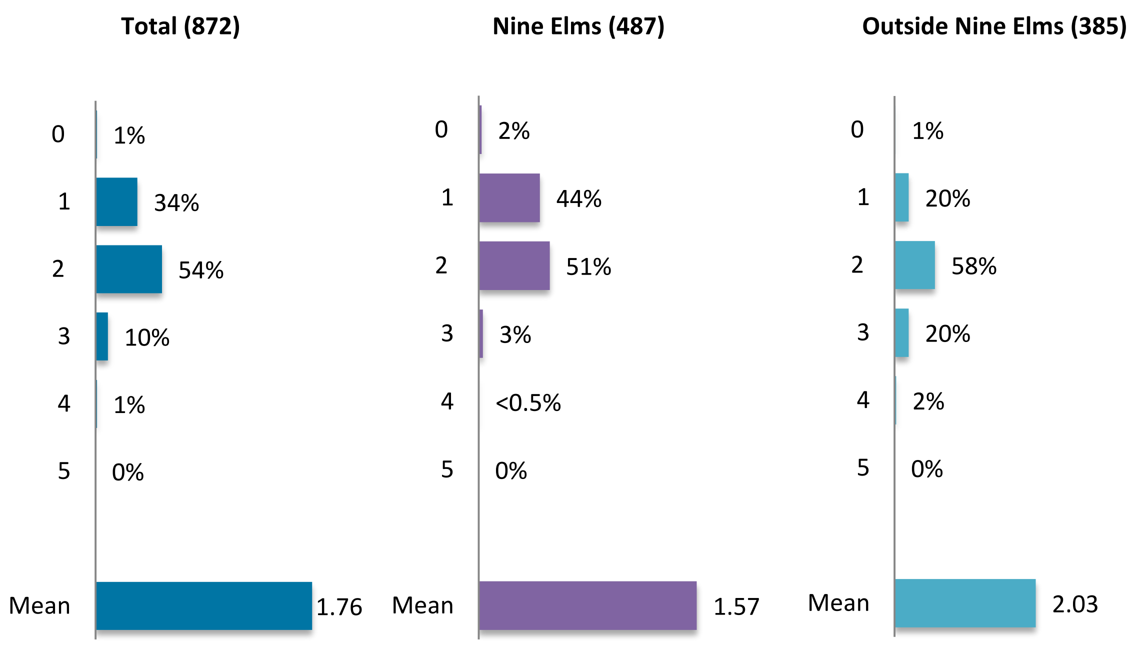
In many tables the total number of responses is less than the figures given above. This is due to respondents not answering individual questions, either because they chose not to or because the question was not relevant.

2 Property size, usage and tenure

2.1 Number of bedrooms

Within the overall dataset there is an average of 1.76 bedrooms per residential property, with most properties containing two bedrooms (54%) or one (34%). No respondent reported more than four bedrooms. Homes outside Nine Elms have a significantly higher number of bedrooms on average compared to those within Nine Elms (2.03 cf. 1.57). This is primarily driven by a higher proportion of 3-bed properties (20% cf. 3%).

Figure 1: Number of bedrooms (All responses)



Unweighted sample bases in parentheses

The number of bedrooms per property can also be analysed by tenure. All significant differences (higher / lower) compared to the total are highlighted in Table 4. For all tenures, the mix of properties is, again, predominately one or two bedrooms. However, there are significant differences by tenure which can be summarised as follows:

- Shared owners have significantly fewer bedrooms on average, compared to other tenures with none of this group reporting having more than two bedrooms.
- Owner occupiers have significantly more bedrooms on average compared to renters, driven chiefly by a significantly higher proportion of 2-bed properties and a significantly lower incidence of 1-bed properties.

Table 4: Number of bedrooms by tenure (All responses)

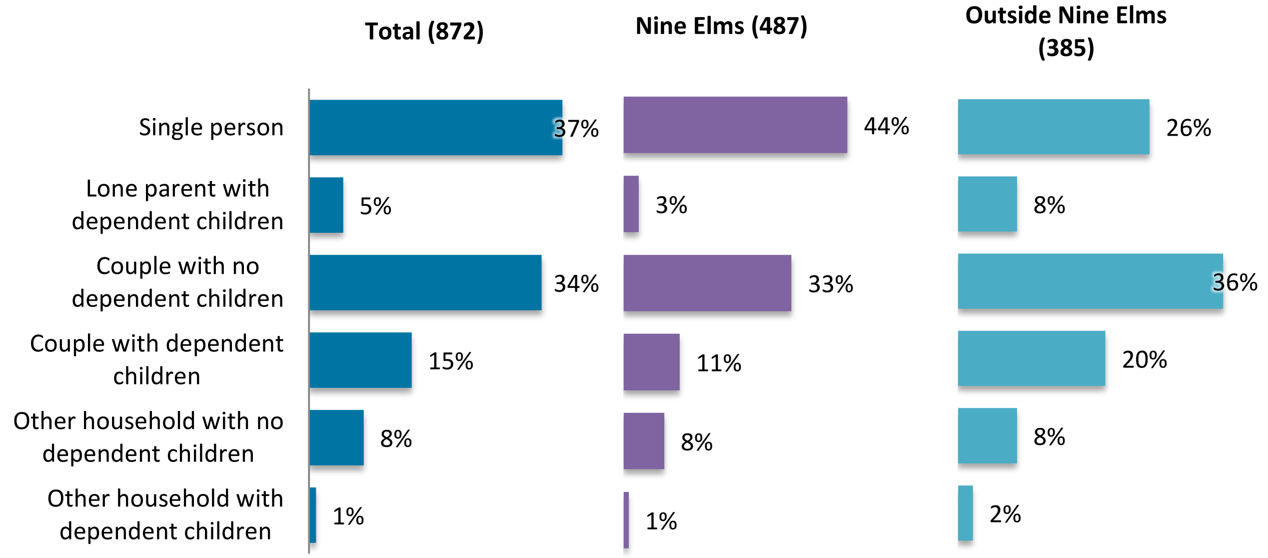
	Total	Owner occupier	Shared ownership	Rent
0	1%	1%	6%	1%
1	34%	24%	51%	39%
2	54%	62%	43%	49%
3	10%	12%	0%	11%
4	1%	2%	0%	<0.5%
Mean	1.76	1.91	1.37	1.71
Unweighted Bases	**872**	**346**	**88**	**413**

2.2 Household composition

In terms of household composition, a majority of households (79%) have no dependent children, with the majority of households consisting of single people (37%) or couples with no dependent children (34%). Of those with dependent children, the majority are couples as the figure below illustrates.

Single people, or couples with no dependent children form the majority of households in both Nine Elms and outside Nine Elms. However, respondents in the area outside Nine Elms are twice as likely to have dependent children compared to Nine Elms (30% cf. 15%).

Figure 2: Household composition (All responses)

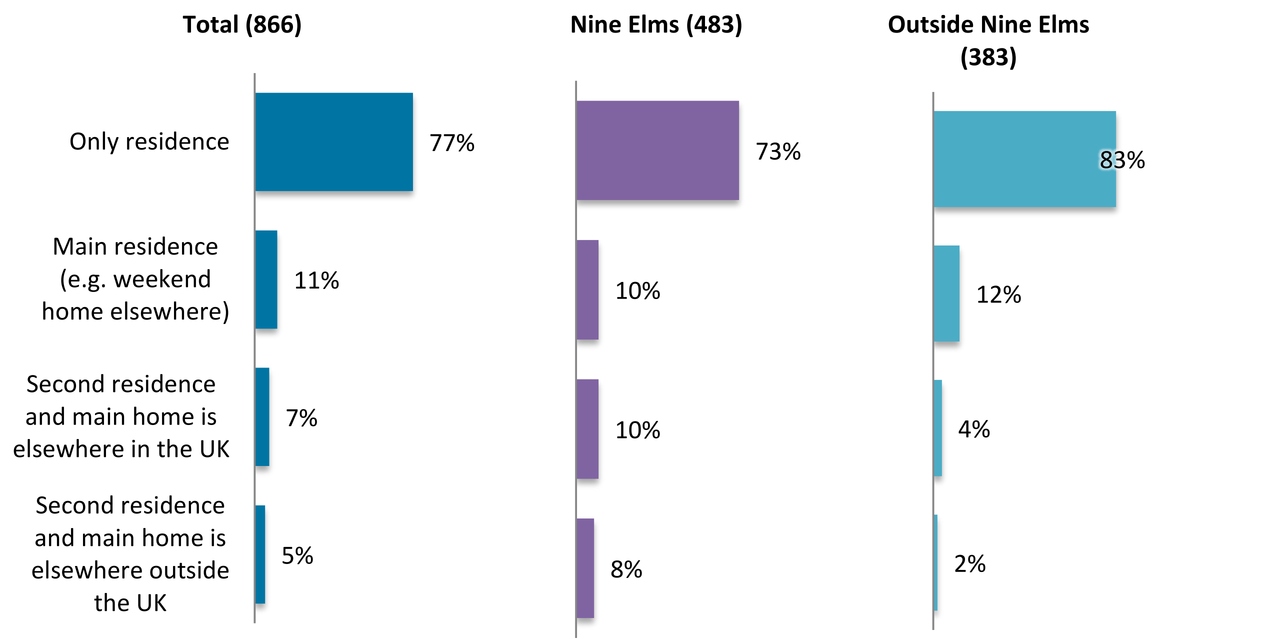


Unweighted sample bases in parentheses

2.3 Occupancy

All respondents were asked if the Wandsworth property was their only residence, their main residence or their second residence. In response, more than three-quarters (77%) state that the property in question is their only residence, and a further 11% state the property is their main (but not sole) residence. However, respondents outside Nine Elms are significantly more likely compared to Nine Elms to describe the property as their only residence (83% cf. 73%). In Nine Elms a total of 28% of respondents gave an answer that suggested that they have a second residence elsewhere.

Figure 3: Full time residency (All responses)



Unweighted sample bases in parentheses

Probing the responses further shows that those whose previous residence was not within the Borough of Wandsworth are significantly less likely to state that their home in Wandsworth is their only residence (72%). However, it should be noted that for both those who previously lived in the Borough and those who did not, a majority state that their Wandsworth home is their only residence.

Table 5: Full time residency by previous residence (All responses)

	Total	Previous residence Wandsworth	Previous residence not Wandsworth
Only residence	77%	**87%**	72%
Main residence (e.g. weekend home elsewhere)	11%	6%	**13%**
Second residence and main home is elsewhere in the UK	7%	5%	8%
Second residence and main home is elsewhere outside the UK	5%	2%	**7%**
Unweighted Bases	**866**	**298**	**566**

As is illustrated by the table below, it is owner occupiers who are least likely to indicate that their Wandsworth address is their only residence (66%). The two thirds of owner occupiers who state that their Wandsworth property is their only residence is significantly below the proportion of shared owners (100%) and renters (82%) who give the same response.

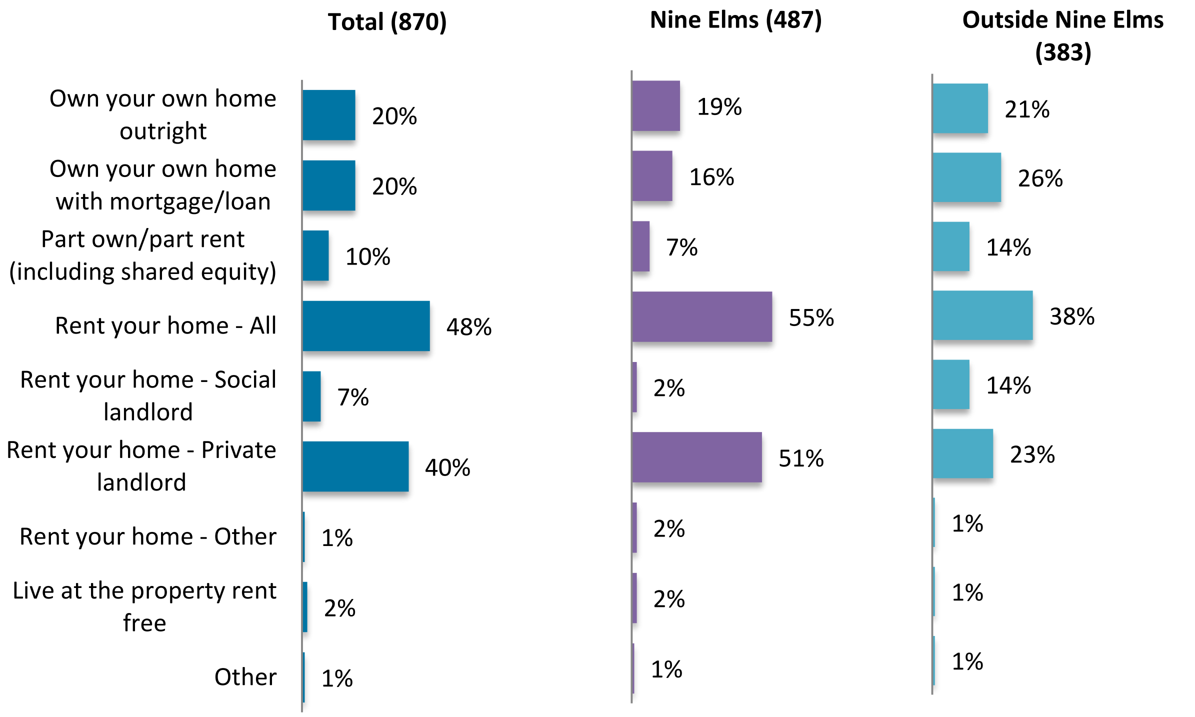
Table 6: Full time residency by previous residence (All responses)

	Total	Owner occupier	Shared ownership	Rent
Only residence	77%	66%	**100%**	**82%**
Main residence (e.g. weekend home elsewhere)	11%	**15%**	0%	9%
Second residence and main home is elsewhere in the UK	7%	**13%**	0%	3%
Second residence and main home is elsewhere outside the UK	5%	**6%**	0%	5%
Unweighted Bases	**866**	**342**	**88**	**412**

2.4 Tenure

The full distribution of tenures seen within the sample is shown by the figure below. Just under half of all respondents indicate that they rent their own home (48%). This proportion rises to 55% in the Nine Elms area, compared to 38% outside of Nine Elms which perhaps gives an initial suggestion the Nine Elms population may see higher levels of turnover in the future. Owner/occupiers are found in 40% of addresses, while 10% of residents are shared owners.

Figure 4: Tenure (All responses)



Unweighted sample bases in parentheses

Renters represent a majority among those with an annual household income below £20,000 (75%) and among those with an income of between £20,000 and £50,000 (52%). The proportion of owner occupiers is highest among those with an annual household income of £150,000 (66%).

Table 7: Tenure by household income (All responses)

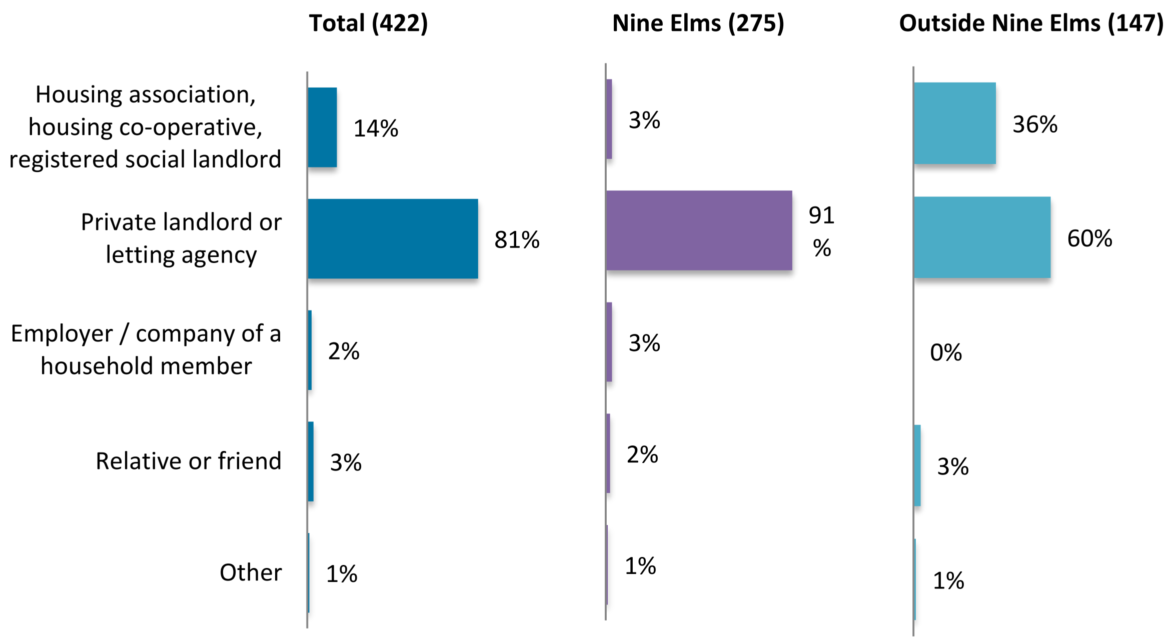
	Total	Less than £20K	£20K - £50K	£50K - £100K	£100K - £150K	£150K+
Own your own home outright	20%	13%	16%	14%	**22%**	**34%**
Own your own home with mortgage/loan	20%	6%	12%	**19%**	**33%**	**32%**
Part own/part rent (including shared equity)	10%	**5%**	**17%**	**15%**	3%	0%
Rent your home	48%	**75%**	**52%**	49%	39%	30%
Live at the property rent free	2%	1%	1%	2%	1%	3%
Other	1%	2%	1%	*%	1%	1%
Unweighted Bases	**870**	**105**	**205**	**272**	**143**	**132**

Among those who have been at their current address for less than one year, 77% rent their home. Among those who have been in their home 1-3 years, renters remain a majority, at 54%. However, among those who have been in their home for more than three years the proportion who rent drops significantly to 27%, with 56% of those who have lived at their address for this period being owner/occupiers.

It is also evident that those with children under 16 in their household are significantly more likely to rent their home than those who do not (56% cf. 46%).

In Nine Elms 91% of those who rent their home do so from a private landlord. Outside of Nine Elms those renting from a private landlord drops to 60%, with 36% renting from a social landlord.

Figure 5: Landlord (Where pay rent - Where provided a response)



Unweighted sample bases in parentheses

All those who pay rent and/or service charges were given the opportunity to rate their satisfaction with what they have to pay. Those who stated that these payments were not applicable to them were removed from the sample bases at these questions. As will be demonstrated later in the analysis, satisfaction with home quality and with the local neighbourhood as a place to live is high in both locations. However, this high satisfaction does not translate into strong positivity in relation to rents and service charges. Overall, just half (50%) of residents in these areas are satisfied with the rent they pay. Among the remainder, 27% give a neutral response of neither satisfied nor dissatisfied and 22% are dissatisfied. Satisfaction with rent drops below half (46%) among those giving a view on rent in the Nine Elms area, whereas 57% are satisfied outside of Nine Elms.

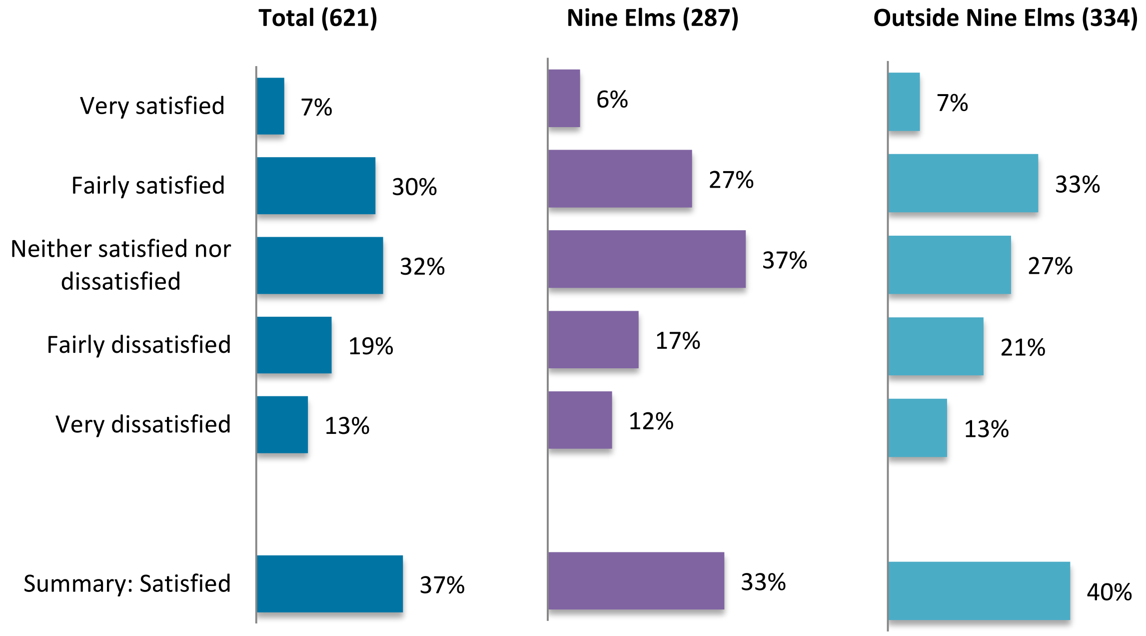
Interestingly, there is no evidence of rent satisfaction and dissatisfaction being significantly influenced by household income. Those with the highest household income (over £150,000 p.a.) are least likely to be dissatisfied with their rent at 18%, but this proportion is only 4-percentage points different to the 22% seen among those with an income of under £20,000 p.a.).

Figure 6: Satisfaction with what is paid in rent (All valid responses)

Unweighted sample bases in parentheses

Among tenants it is common for service charge value for money to be viewed less positively than rent. This is the case in this research, with 37% of those answering in relation to service charges satisfied with what they pay. This is marginally above the 32% who are neutral and the 32% who are dissatisfied with their service charge.

Figure 7: Service Charge satisfaction (All valid responses)



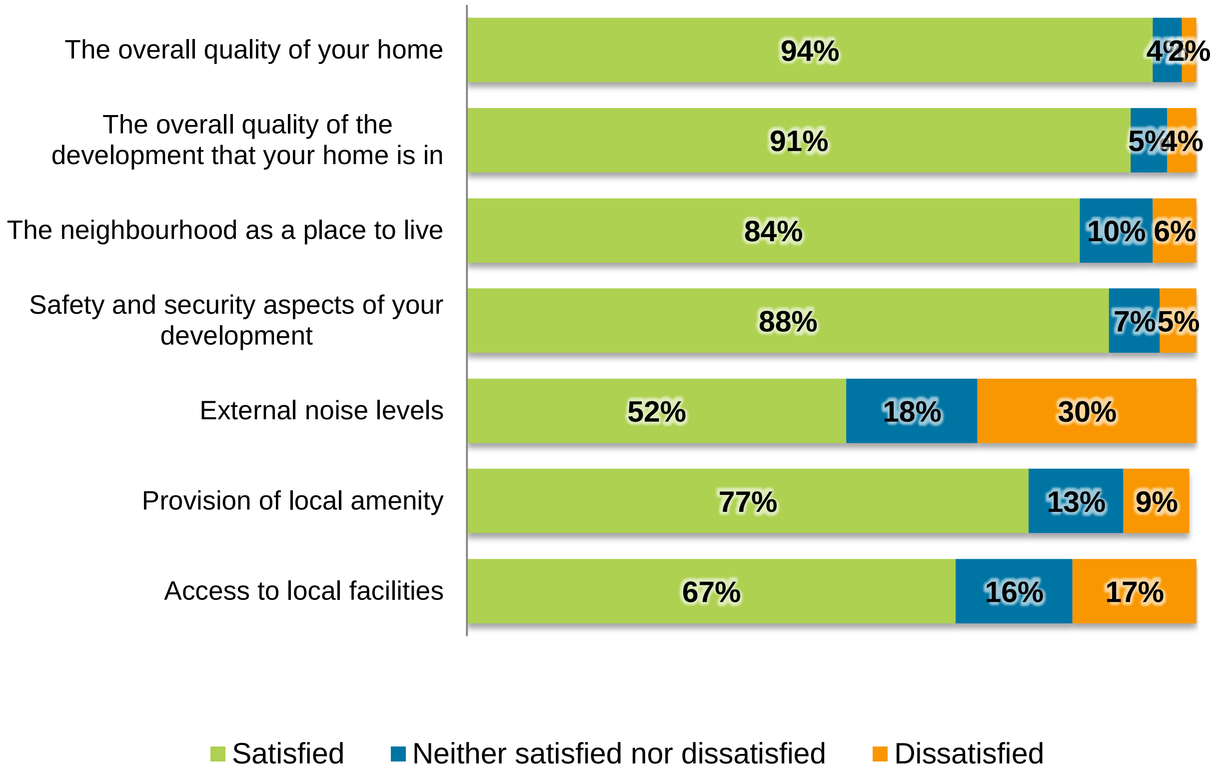
Unweighted sample bases in parentheses

3 Levels of satisfaction

Residents were asked to indicate how satisfied they are with their property and their local neighbourhood. In response high levels of satisfaction are evident with the quality of homes (94%), and of the development containing their home (91%). Alongside this, 88% of residents are satisfied with the safety and security aspects of their development, while 84% are satisfied with their neighbourhood as a place to live.

The level of external noise appears to be an issue for some residents. While just over half (52%) are satisfied with this aspect of their home, three in ten (30%) are dissatisfied with the level of noise. This level of dissatisfaction is consistent by location. Access to local facilities (e.g. shops, leisure facilities) also produces a higher level of dissatisfaction (17%) among all residents.

Figure 8: Local area satisfaction indicators (All responses)



Unweighted base: 868

Looking at the satisfaction levels expressed by Nine Elms residents relative to those outside of Nine Elms shows that dissatisfaction with access to local facilities is notably higher among the former at 25%. Outside Nine Elms where the local infrastructure is more mature only 6% are dissatisfied with access to local facilities. There is also a significant difference in overall neighbourhood satisfaction between residents of the two areas. While a clear majority of 79% of Nine Elms residents are satisfied with their neighbourhood as a place to live, this proportion is significantly below the 92% of those outside of Nine Elms who give the same response.

Table 8: Local area satisfaction indicators by location (All responses)

Nine Elms	Satisfied	Neither	Dissatisfied
The overall quality of your home	94%	4%	2%
The overall quality of the development that your home is in	92%	5%	3%
The neighbourhood as a place to live	79%	13%	8%
Safety and security aspects of your development	90%	6%	3%
External noise levels	51%	18%	31%
Provision of local amenity	73%	16%	11%
Access to local facilities	57%	18%	25%

Outside Nine Elms	Satisfied	Neither	Dissatisfied
The overall quality of your home	94%	3%	3%
The overall quality of the development that your home is in	89%	5%	6%
The neighbourhood as a place to live	92%	5%	2%
Safety and security aspects of your development	85%	8%	7%
External noise levels	54%	17%	29%
Provision of local amenity	83%	10%	8%
Access to local facilities	81%	13%	6%

Further salient findings from the analysis of the satisfaction levels expressed include:

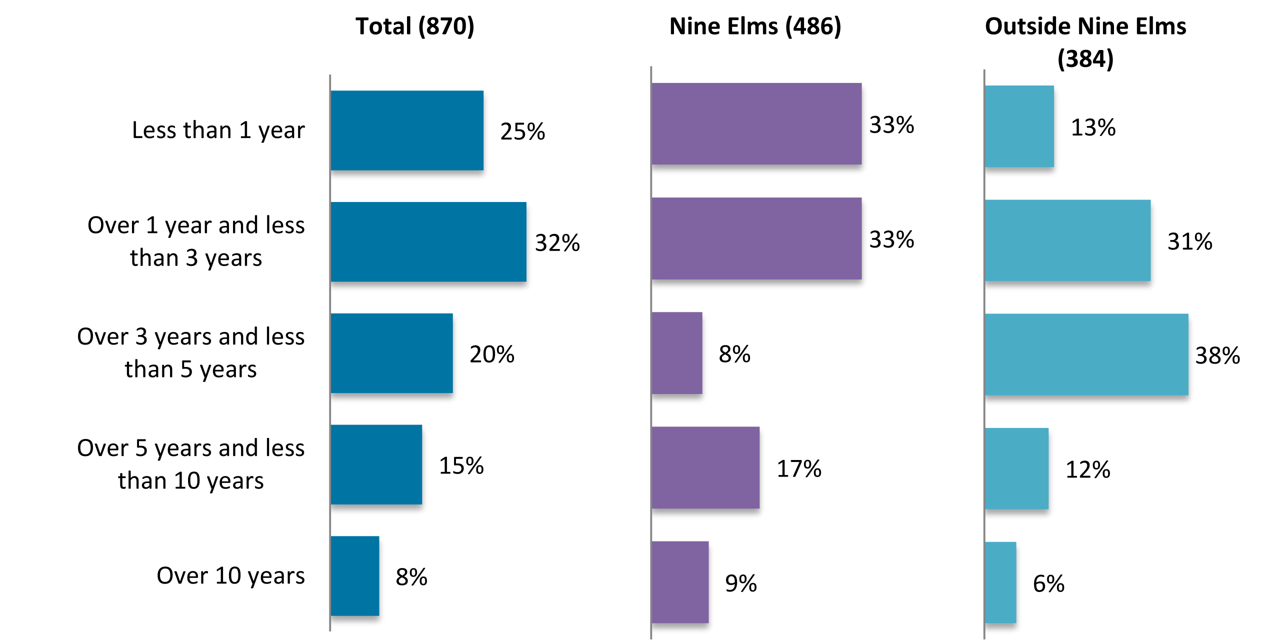
- Satisfaction of the home is consistently high across all tenures, but peaks at 96% among owner occupiers.
- There is no variation in home satisfaction by the number of bedrooms within the property.
- Those with children aged under 16 in their household are significantly more likely to be satisfied with access to local facilities than those who do not (76% cf. 65%).

4 Population Turnover and future plans

4.1 Time at current address

The responses that residents gave in terms of how long they have lived at their current address show that 25% of respondents had lived at a different address one year previously. This proportion rises to 33% within Nine Elms. As might be anticipated, the population outside of Nine Elms is more established, with 56% of residents having lived at their current address for 3 or more years compared to 34% of Nine Elms residents.

Figure 9: Time at current address (All responses)



Unweighted sample bases in parentheses

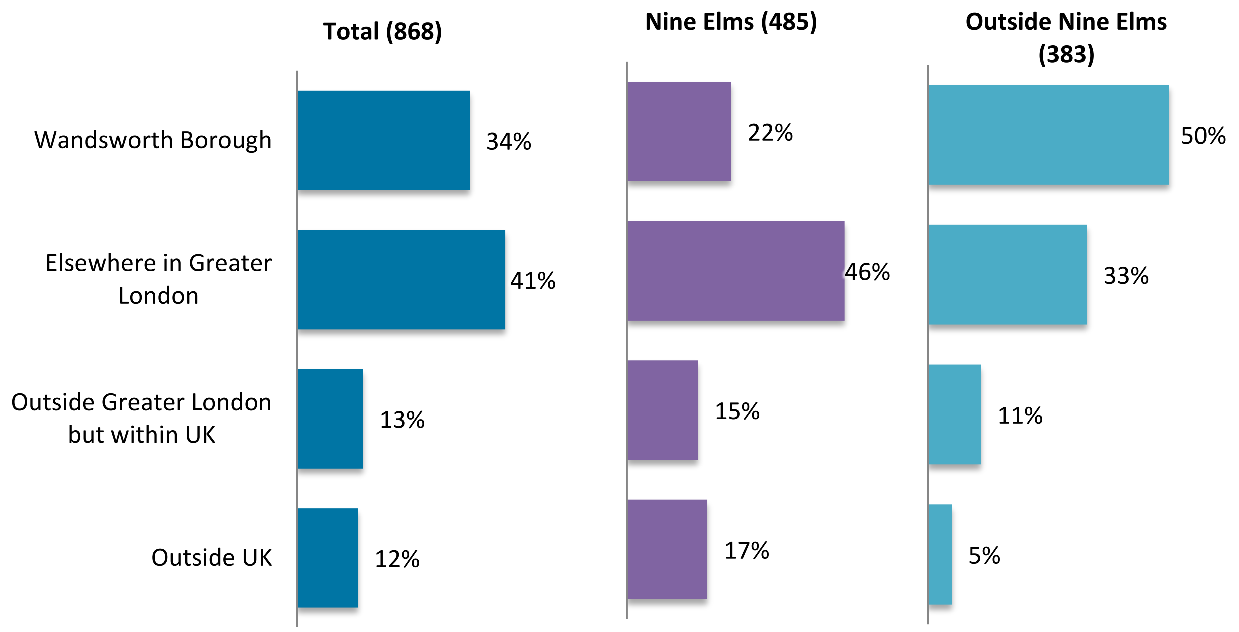
Breaking the responses down by tenure shows that residents who rent their home are significantly more likely to have moved to their current address within the last year (40%) or between 1 and 3 years ago (36%).

Table 9: Time at current address by tenure (All responses)

	Total	Owner occupier	Shared ownership	Rent
Less than 1 year	25%	11%	7%	**40%**
Over 1 year and less than 3 years	32%	29%	25%	**36%**
Over 3 years and less than 5 years	20%	21%	**33%**	17%
Over 5 years and less than 10 years	15%	**22%**	**29%**	6%
Over 10 years	8%	**17%**	**7%**	1%
Unweighted Bases	**870**	**345**	**88**	**413**

The information residents gave about where they live previously shows that the Nine Elms population is significantly less likely to have previously come from other areas of Wandsworth (22% compared to 50% of those outside Nine Elms) and is more likely to have previously lived outside the UK (17% cf. 5%). However, in both locations a majority of residents did previously live in Greater London previous to their current address as shown by the figure below.

Figure 10: Where did you live previously (All responses)



Unweighted sample bases in parentheses

Those who have lived at their current address for less than one year are significantly more likely to have previously lived outside of the UK (27%), that those who have lived at their address for 1 to 3 years (12%) and 3 or more years (4%). A quarter (24%) of those who have lived in their property for less than 1 year previously lived in Wandsworth Borough, 39% lived elsewhere in Greater London and 9% came from outside of London but within the UK.

More details on the nationality and passport ownership of those living in the study areas can be found in Chapter 5 of this report.

4.2 Future plans

In order to provide some insight into the potential stability of the residential populations this research is focusing upon, all respondents were also asked how long they plan to live at their current address and how long they plan to live in Wandsworth borough.

In total, 15% of residents plan to live at their current address for less than one year, with a further 36% expecting to stay in their current location for between 1 and 3 years. It appears that the Nine Elms population is most likely to see the greatest churn, with the 18% suggesting that they will move within a year significantly higher than the 12% recorded outside of Nine Elms.

The proportions planning to move out of the borough altogether within the next year and in 1 to 3 years time are lower, but there is still potential for at third (34%) of current residents of these two locations to no longer be Wandsworth residents within 3 years, suggesting notable transience within these populations.

Table 10: Future plans (All responses)

Length of time plan living at current address	Total	Nine Elms	Outside Nine Elms
Less than 1 year	15%	**18%**	12%
Between 1 and 3 years	36%	38%	33%
Between 3 and 5 years	13%	14%	12%
Between 5 and 10 years	7%	7%	8%
Over 10 years or more	12%	9%	**17%**
Don't know	16%	15%	18%
Unweighted sample base:	**858**	**483**	**375**
Length of time plan living at Wandsworth Borough	**Total**	**Nine Elms**	**Outside Nine Elms**
Less than 1 year	9%	**13%**	5%
Between 1 and 3 years	25%	28%	22%
Between 3 and 5 years	15%	16%	15%
Between 5 and 10 years	7%	7%	7%
Over 10 years or more	15%	10%	22%
Don't know	28%	27%	**29%**
Unweighted sample base:	**767**	**425**	**342**

In interpreting the table above it should be noted that residents more commonly expressed uncertainty (i.e. answered don't know) in relation to their likelihood of staying within Wansdworth, compared to whether they would stay at their current address.

Analysis by tenure shows that 23% of residents in the target areas who rent expect to move from their current address within a year and a further 46% expect to do so in between 1 and 3 years. Among owners, while a quarter expect to move in between 1 to 3 years, the proportions anticipated a longer stay at their current address are significantly higher when compared to renters.

Table 11: Future living arrangements

Length of time plan living at current address	Owner occupier	Shared ownership	Rent
Less than 1 year	6%	8%	**23%**
Between 1 and 3 years	25%	33%	**46%**
Between 3 and 5 years	15%	17%	10%
Between 5 and 10 years	**11%**	**15%**	3%
Over 10 years or more	**20%**	10%	7%
Don't know	**22%**	16%	11%
Unweighted sample base:	**338**	**85**	**411**
Length of time plan living at Wandsworth Borough	**Owner occupier**	**Shared ownership**	**Rent**
Less than 1 year	5%	4%	**14%**
Between 1 and 3 years	15%	19%	**34%**
Between 3 and 5 years	16%	14%	16%
Between 5 and 10 years	**10%**	9%	4%
Over 10 years or more	**20%**	10%	12%
Don't know	**34%**	43%	20%
Unweighted sample base:	**291**	**77**	**380**

All those who indicated that they plan to move from their current address in the next three years were presented with a list of possible reasons for this. All were asked to choose up to three of these explanations. The reasons given related to property choices, neighbourhood choices, career and family reasons and 'other.' The responses given are summarised in the table below. The three most commonly selected reasons all related to property characteristics. Firstly, 36% suggested that they would move in order to have a larger property, 21% suggested it would be so that they could buy rather than rent and 20% mentioned wanting to move to a property with a garden or larger garden.

Beyond this, relocation overseas (17%) and high house prices in the neighbourhood (15%) were the other most commonly cited factors in explaining a likely house move in the next three years.

Table 12: Reasons why individuals are likely to move from their current address in the next three years (All likely to move in next three years)

Reason given	%
Property choices	
To move to a larger property	36%
To move to a property with garden/larger garden	20%
To be able to buy rather than rent	21%
Neighbourhood choices	
Level of crime	2%
Traffic congestion	3%
Air pollution	10%
Noise	9%
High house prices	15%
High cost of living	8%
Career and family reasons	
School choices	8%
To move closer to family/friends	10%
To move closer to work	7%
Career move	12%
Retirement	3%
Relocation outside of London	12%
Relocation overseas	17%
Change in personal circumstances	12%
Other reasons	
Other	7%
Don't know	<0.5%
Unweighted sample base:	**415**

The table below shows the top 5 reasons given by likely movers in each location. This demonstrates that property size, garden access and home ownership aspirations are the key drivers of population movement for those living outside of Nine Elms. The more international nature of the Nine Elms population means that moving overseas is more commonly cited as a reason for future relocation here.

Table 13: Key reasons for likely relocation by area (All likely to move in next three years)

Nine Elms		Non-Nine Elms	
To move to a larger property	28%	To move to a larger property	50%
Relocation overseas	23%	To move to a property with garden/larger garden	32%
To be able to buy rather than rent	18%	To be able to buy rather than rent	27%
Career move	15%	High house prices	22%
To move to a property with garden/larger garden	13%	Relocation outside of London	16%
Unweighted sample base:	**257**	**Unweighted sample base:**	**158**

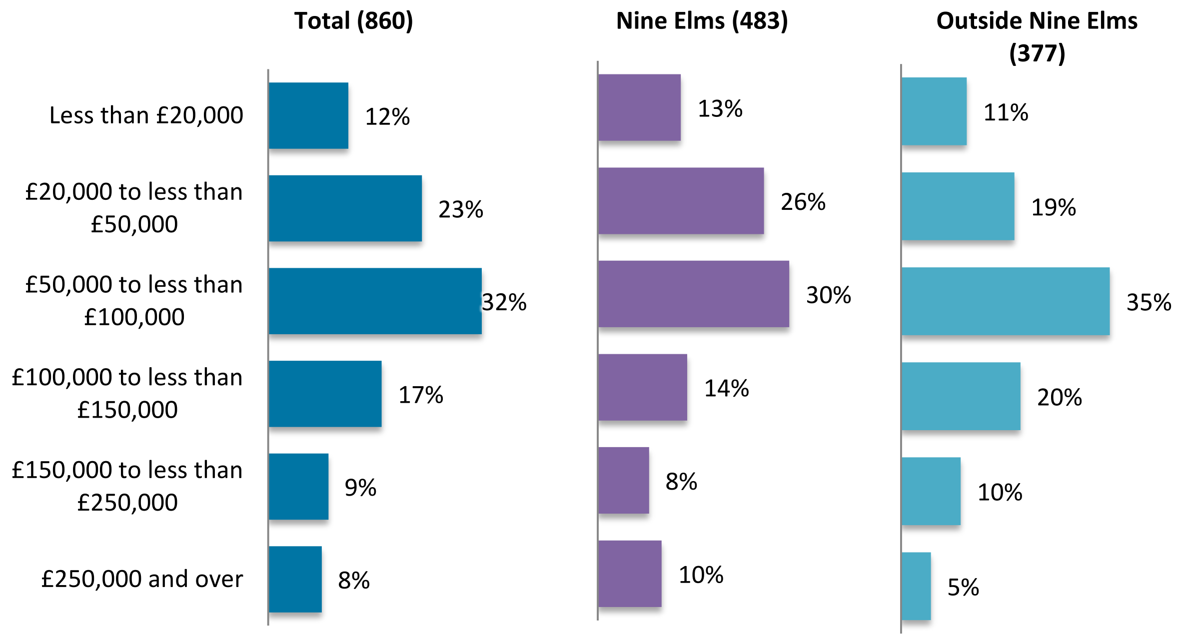
The proportion of renters anticipating moving from their current address in the next three years who suggest this will be due to relocating overseas at 22% is approaching twice than seen among owner occupiers (12%).

5 Household information

5.1 Income

The survey asked residents about their gross household income, i.e. before tax. As is shown below, in the two study areas residents with an income under £20,000 per annum can be found. The most common responses given are that household income is in the £50,000-£10,000 band (30% of Nine Elms residents and 35% of those outside Nine Elms). However, within the Nine Elms area the proportion of residents with a household income above £250,000 at 10% is twice that seen outside the Nine Elms area (5%).

Figure 11: Household's combined gross (before tax) annual income (including any benefits, pension etc.) (All responses)



Unweighted sample bases in parentheses

Breaking the responses down by tenure, as might be anticipated, owner occupiers more commonly have higher household incomes (£100,000 p.a. or above). Interestingly, shared owners are significantly more likely than other tenure groups to have a gross household income of between £50,000 and £100,000 p.a.

Table 14: Household's combined gross (before tax) annual income (including any benefits, pension etc.) Responses by tenure (All responses)

	Total	Owner occupier	Shared ownership	Rent
Less than £20,000	12%	5%	6%	**19%**
£20,000 to less than £50,000	23%	16%	40%	**25%**
£50,000 to less than £100,000	32%	26%	**49%**	32%
£100,000 to less than £150,000	17%	**24%**	5%	14%
£150,000 to less than £250,000	9%	**15%**	0%	6%
£250,000 and over	8%	**14%**	0%	5%
Unweighted Bases	**860**	**339**	**87**	**409**

5.2 Household composition

The number of people in each household can also be analysed against the number of bedrooms, enabling a picture to be formed of under occupancy. Under-occupied properties - defined as those with more bedrooms than household members - are highlighted in purple in the table below. It should be noted that this definition does not take into account any regular overnight visitors who are not part of the household, such as agency carers; conversely, it also does not take account of any household members who share a bedroom.

The number of responses for 0 and 4-bedroom properties (11 cf. 10) is too low to enable conclusions to be drawn. However, approaching half (46%) of 3-bedroom properties are under-occupied, including 15% where there is only one household member. One in four (24%) 2-bedroom properties are also under-occupied.

Table 15: Household composition (All responses)

		Number of bedrooms				
Number in household	**Total**	**0**	**1**	**2**	**3**	**4**
One	37%	100%	63%	24%	15%	20%
Two	44%	0%	34%	54%	31%	10%
Three	13%	0%	2%	18%	23%	30%
Four	5%	0%	1%	4%	18%	40%
Five	1%	0%	0%	0%	10%	0%
Six	1%	0%	0%	0%	3%	0%
Mean	**1.91**	**1**	**1.4**	**2.05**	**2.86**	**2.89**
Unweighted Bases	860	11	286	460	93	10
Weighted Bases	859	11	291	461	88	9

The same analysis is provided below for Nine Elms. The findings for 0, 3, and 4-bedroom properties should be treated with considerable caution due to low sample sizes. However, over a quarter (27%) of 2-bedroom properties are under-occupied.

Table 16: Household composition (Nine Elms)

		Number of bedrooms				
Number in household	**Total**	**0**	**1**	**2**	**3**	**4**
One	45%	100%	66%	27%	32%	52%
Two	42%	0%	31%	55%	21%	0%
Three	10%	0%	3%	15%	36%	0%
Four	3%	0%	1%	4%	11%	48%
Five	0%	0%	0%	0%	0%	0%
Six	0%	0%	0%	0%	0%	0%
Mean	**1.7**	**1**	**1.38**	**1.95**	**2.27**	**2.45**
Unweighted Bases	479	8	211	240	18	2
Weighted Bases	501	8	220	254	17	2

Outside Nine Elms, sample sizes are also low for 0 and 4-bedroom properties. However, 44% of 3-bed properties are under-occupied, as are 20% of 2-bed properties. On property sizes where valid comparisons are possible, occupancy is slightly higher outside Nine Elms compared to Nine Elms:

- 1-bed properties: a mean of 1.47 household members outside Nine Elms compared to 1.38 in Nine Elms
- 2-bed properties: a mean of 2.17 household members outside Nine Elms compared to 1.95 in Nine Elms.

Table 17: Household composition (Outside Nine Elms)

		Number of bedrooms				
Number in household	**Total**	**0**	**1**	**2**	**3**	**4**
One	25%	100%	55%	20%	11%	13%
Two	46%	0%	44%	52%	33%	13%
Three	18%	0%	1%	22%	20%	38%
Four	8%	0%	0%	5%	20%	37%
Five	3%	0%	0%	1%	12%	0%
Six	1%	0%	0%	1%	4%	0%
Base for stats	0%	0%	0%	0%	0%	0%
Mean	**2.21**	**1**	**1.47**	**2.17**	**3.01**	**3**
Unweighted Bases	381	3	75	220	75	8
Weighted Bases	358	3	71	207	71	8

The age and gender structure of residents surveyed is shown in the table below. There is a male-female split of 51%-49%, with no significant difference between Nine Elms and the area outside Nine Elms. In terms of age, for both areas the bulk of residents are aged between 20 and 59. However, there is greater polarisation by age group outside Nine Elms, with this area comprising a significantly higher proportion of residents in age groups up to 15, and also, nearer the opposite end of the scale, a significantly higher proportion of 60-79 year olds.

Table 18: Age and Gender (All household members)

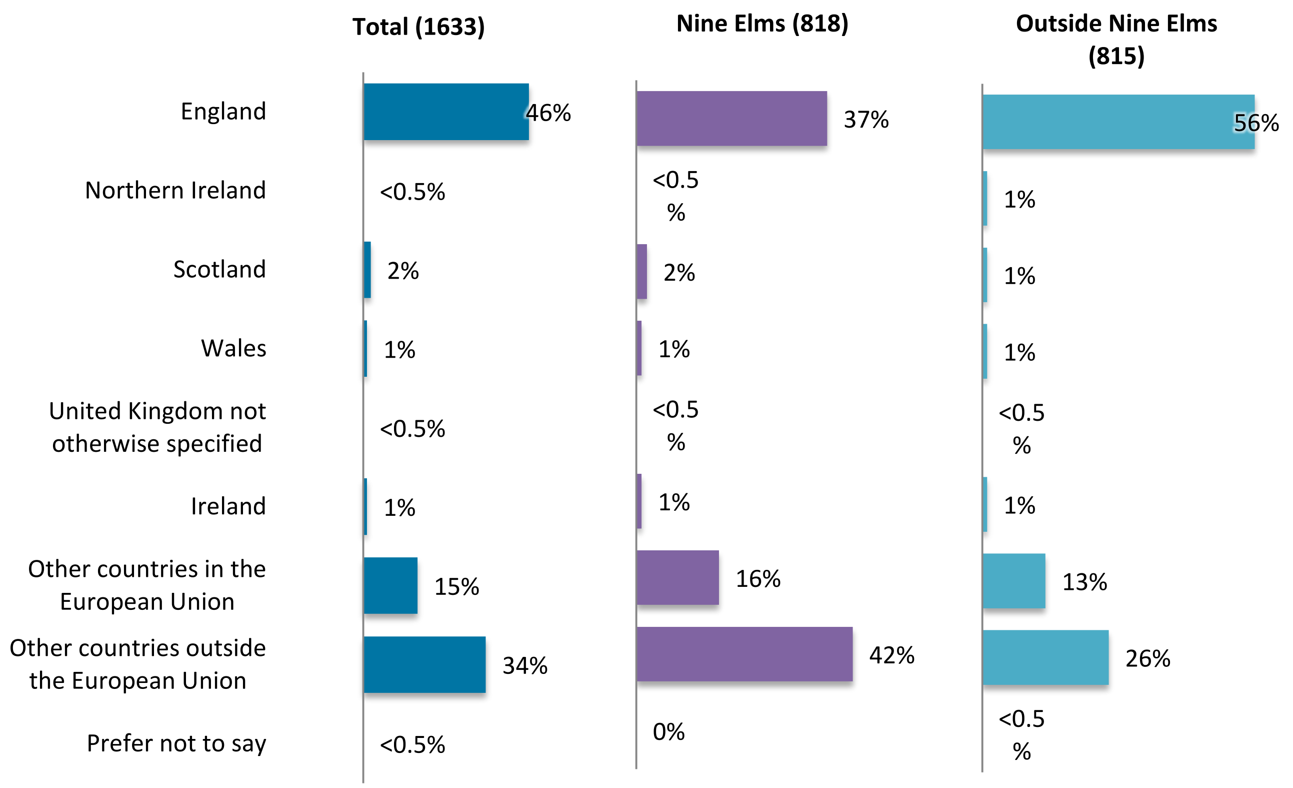
Gender	**Total**	**Nine Elms**	**Outside Nine Elms**
Male	51%	52%	49%
Female	49%	48%	51%
Age			
0-2	5%	4%	**7%**
3-4	2%	1%	**3%**
5-10	4%	2%	**6%**
11-15	2%	1%	**3%**
16-19	2%	2%	2%
20-29	22%	**27%**	17%
30-39	31%	31%	30%
40-59	22%	23%	21%

60-79	9%	7%	11%
80+	1%	1%	1%
Prefer not to say	1%	*%	1%

5.3 Country of origin and ethnicity

The survey included a question asking the country of birth for all members of the household. Responses for these questions on a household member base show that the composition of the two study areas is quite different. In Nine Elms more residents were born in other countries outside of the European Union (42%) than in England or other parts of the United Kingdom. In comparison in the non-Nine Elms area, those born in England are the most common group (56%), followed by a further 26% who were born outside of the EU.

Figure 12: Where people in household were born (All household members)



Unweighted sample bases in parentheses

These variations in the country of birth translate into a different ethnic profile of residents in each area. Significant variations are shown by the underlined figures overleaf. The largest difference in the ethnic composition of the two area is that Nine Elms is made up of 37% White British residents compared to 47% of residents outside of Nine Elms. A further 10-percentage point difference is also seen in the number of Other White background residents in Nine Elms (28%) compared to elsewhere (18%).

Table 19: Ethnic Group (All household members)

	Total	Nine Elms	Outside Nine Elms
White			
English/Welsh/Scottish/ Northern Irish/British	42%	37%	**47%**
Irish	1%	2%	1%
Gypsy or Irish Traveller	*%	*%	0%
Any other White background	23%	**28%**	18%
Mixed			
White and Black Caribbean	2%	*%	**3%**
White and Black African	*%	*%	*%
White and Asian	1%	1%	1%
Any other mixed/multiple ethnic background	3%	1%	**4%**
Asian/Asian British			
Indian	3%	3%	2%
Pakistani	1%	1%	2%
Bangladeshi	*%	0%	***%**
Chinese	3%	**4%**	2%
Any other Asian background	4%	**6%**	2%
Black/ Black British			
African	3%	1%	**5%**
Caribbean	1%	*%	**2%**
Any other Black/African/Caribbean background	2%	1%	**2%**
Other			
Arab	5%	**7%**	3%
Any other ethnic group	4%	**6%**	2%
Do not wish to complete this section	1%	1%	1%
Unweighted Bases	**1663**	**825**	**838**

The information given on the passports held by household members suggests a greater prevalence within the Nine Elms population of residents with links to other EU countries (19%), to countries in the Middle East and Asia (15%), other European countries not in the EU (7%) and to North America and the Caribbean nations (5%).

Table 20: Type of passport (All household members)

	Total	Nine Elms	Outside Nine Elms
No passport	2%	*%	**3%**
United Kingdom	60%	51%	**71%**
Republic of Ireland	1%	1%	1%
Other Europe: EU countries	16%	**19%**	14%
Other Europe: Non-EU countries	4%	**7%**	2%
Africa	1%	1%	2%
Middle East and Asia	11%	**15%**	6%
North America and the Caribbean	3%	**5%**	1%
Central America	*%	**1%**	0%
South America	1%	*%	**1%**
Antarctica and Oceania	*%	*%	*%
British Overseas Territories	*%	*%	0%
Unweighted Bases	**1631**	**821**	**810**

5.4 Employment

Residents were asked to identify the employment status of everyone aged 16 or over in their household. A majority (54%) are employed full-time, with similar proportions of full-time employees in Nine Elms (55%) and elsewhere (53%). A further 13% are self-employed and 12% are in full-time education. Nine Elms has a significantly higher proportion of residents in full-time education compared to elsewhere (14% cf. 9%); this is in keeping with the higher proportion of 16-29 year-olds in this area. Conversely, the area outside Nine Elms has a significantly higher proportion who are wholly retired (8% cf. 5%), mirroring the higher proportion of older residents in this area.

On average, there is a mean of 0.66 full-time employees per household, with no significant difference between Nine Elms (0.64) and elsewhere (0.68).

Table 21: Employment status of people in household (All household members aged 16 or over)

Gender	Total	Nine Elms	Outside Nine Elms
Employee in full time job (30 hours plus per week)	54%	55%	53%
Employee in part-time job (under 30 hours per week)	4%	2%	**<u>5%</u>**
Self employed full time or part-time	13%	13%	13%
Government supported training	*%	*%	*%
Unemployed and available for work	2%	3%	2%
Wholly retired from work	6%	5%	**<u>8%</u>**
Full time education at school, college or university	12%	**<u>14%</u>**	9%
Looking after family/home	5%	5%	5%
Permanently sick/disabled	1%	*%	**<u>1%</u>**
Doing something else	1%	1%	1%
Not applicable/prefer not to say	2%	2%	3%
Unweighted Bases	**1499**	**771**	**728**

5.5 Place of work / school / college / sixth form

Respondents were asked to supply, for each member of their household in work / education, the postcode of their main place of work or school / college / sixth form. Those working from home were asked to supply their home postcode. Residents are three times as likely to give a postcode in Central London (44%) as the next most common response (Wandsworth Borough, 15%). However, Nine Elms residents are significantly more likely to have their workplace / place of education in Central London compared to other residents (51% cf. 34%). Most of this difference is accounted for by the higher proportion of residents outside Nine Elms who give a postcode within Wandsworth, as indicated below.

Table 22: Postal district for place of work / school / college / sixth form (All household members in work / education)

Gender	Total	Nine Elms	Outside Nine Elms
Work from home	6%	**7%**	4%
Wandsworth Borough	15%	8%	**25%**
Central London	44%	**51%**	34%
SE Other	2%	2%	2%
SW Other	9%	9%	9%
W Other	4%	3%	6%
London Other	9%	10%	7%
CR, KT, SM, TW	3%	1%	**5%**
Other	8%	8%	9%
Unweighted Bases	**701**	**395**	**306**

5.6 Mode of travel to place of work / education

A wide variety of modes of transport (to work / education) are used, as the table below indicates. However, the main modes mentioned involve public transport (tube / train / bus), as well as walking (13%).

There are marked divergences in how residents in the two target areas commute, with significant differences between the areas highlighted below. Whilst forms of public transport are the most common response amongst both groups, residents outside Nine Elms are significantly more likely to drive (12% cf. 7% elsewhere). Incidence of walking and cycling is similar in both areas despite the higher proportion of residents outside Nine Elms whose main place of work / education is in Wandsworth Borough (see Section 5.5).

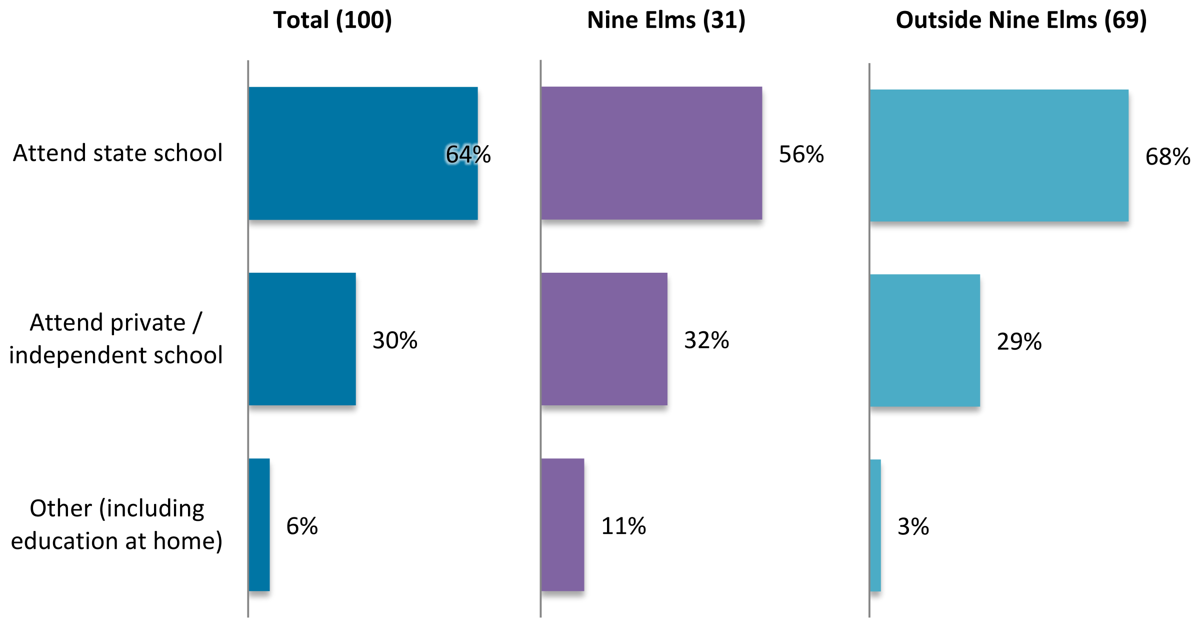
Table 23: Mode of transport (All household members in work / education)

Gender	Total	Nine Elms	Outside Nine Elms
Car	9%	7%	**12%**
Motorbike	1%	1%	2%
Tube	21%	**29%**	13%
Train	12%	6%	**18%**
Bus	15%	**19%**	11%
Taxi	2%	**3%**	1%
Bicycle	6%	5%	7%
Walk	13%	13%	12%
Other	2%	1%	**3%**
Work/study at home	4%	4%	4%
Does not apply	14%	12%	**16%**
Prefer not to say	1%	1%	1%
Unweighted Bases	**1538**	**769**	**769**

5.7 Schooling

Amongst children aged 0-4 and not yet in education, approaching two-thirds (64%) are expected to attend a state school, whilst 30% are expected to attend a private school. There are no significant differences in the responses given by residents in Nine Elms compared to elsewhere. The low base size at this question should be noted.

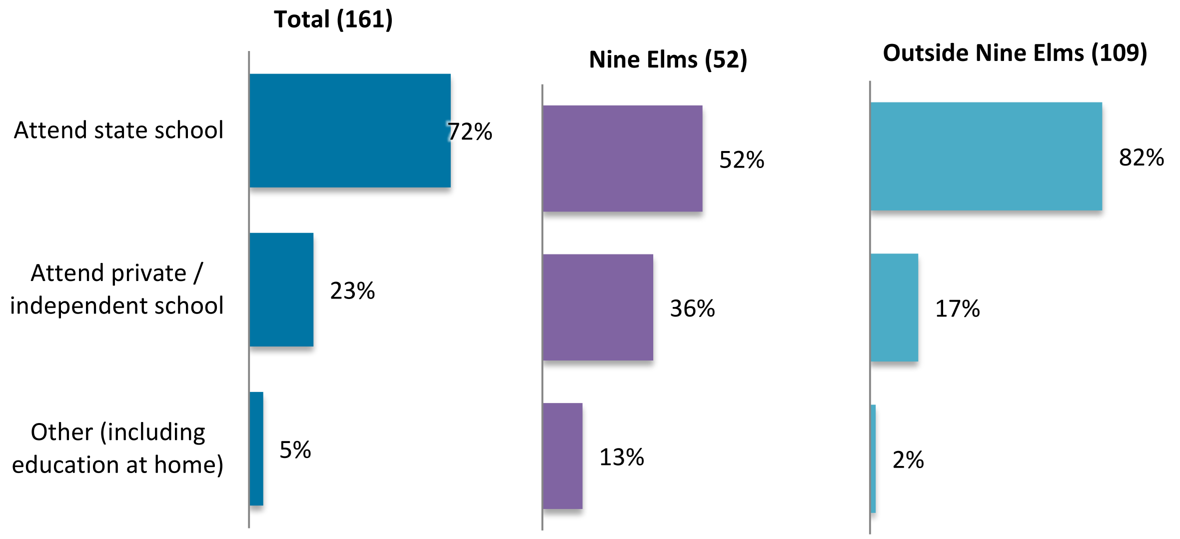
Figure 13: Children and schooling (Valid responses excluding not applicable, where children aged 0-4 not yet in education)



Unweighted sample bases in parentheses

Amongst children and teenagers already in full-time education, approaching three-quarters (72%) attend a state school whilst 23% attend a private school. Children and teenagers outside Nine Elms are significantly more likely to attend a state school, and significantly less likely either to attend a private school / other education, compared to Nine Elms residents.

Figure 14: Children and schooling (Valid responses excluding not applicable, where children / teenagers in full time education)

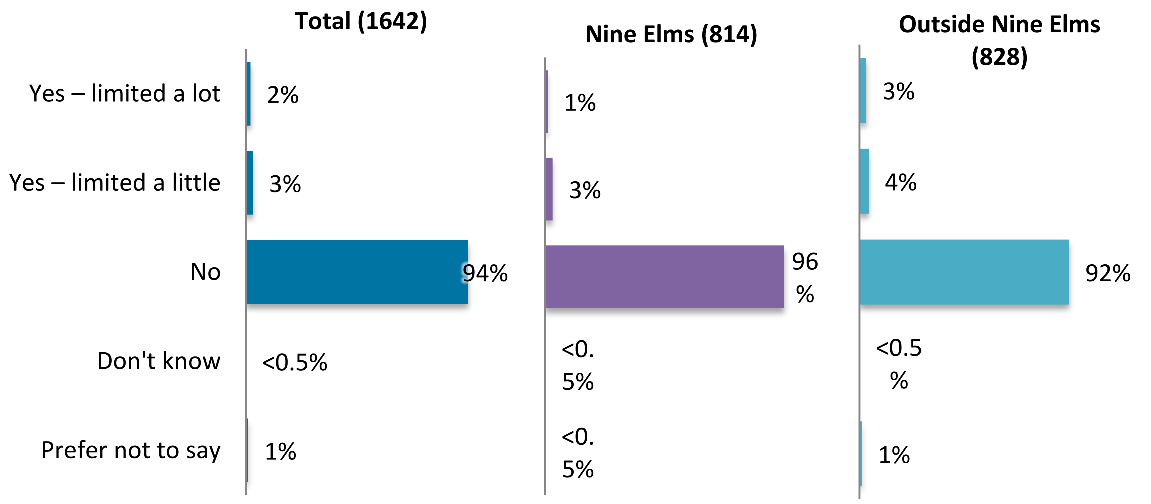


Unweighted sample bases in parentheses

5.8 Health and GP Registration

The incidence of long term health problems or disability in the target populations is low. In total, 5% of all household members for which information was provided have their day to day activities limited because of a health problem or disability which has lasted or is expected to last at least 12 months. As is shown by the figure below, such health problems or disabilities are marginally more prevalent outside Nine Elms (7% total) than within Nine Elms (4%).

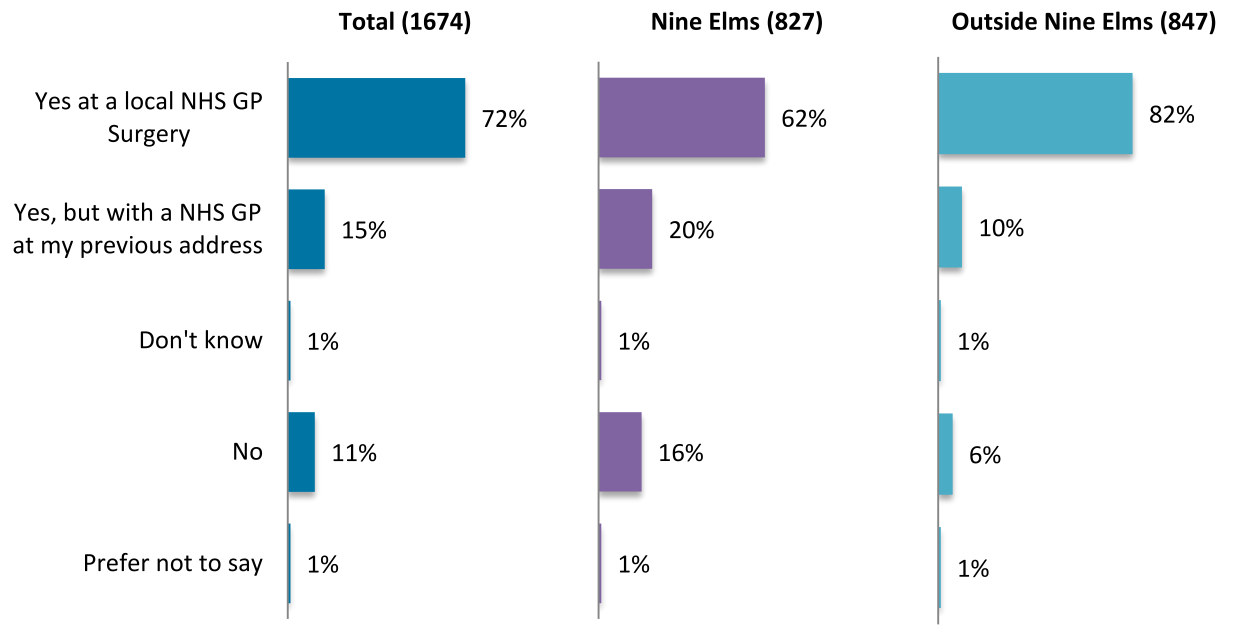
Figure 15: Disability (All household members)



Unweighted sample bases in parentheses

A majority of 72% of household members in the survey areas are registered with a local GP, with a further 15% registered at a GP at their previous address. It is in Nine Elms where potentially there is the greatest potential future need for local GP capacity given that here only 62% of all household members are registered with a local GP surgery. The comparable figure in the outside Nine Elms area is 82%.

Figure 16: GP Registration (All household members)



Unweighted sample bases in parentheses

A follow up question on this subject provides very little evidence that the gap of local GP registrations is due to issues with capacity or access in the immediate neighbourhood. Overall less than 0.5% mentioned difficulties registering with a local surgery and 1% mentioned a lack of appointments at a local surgery. The most common explanations for not being registered with a local NHS GP surgery are not having had time to do so (33%), a preference for a previous NHS GP (26%) and a preference for private treatment (13%).

Table 24: Reasons for persons not being registered with a local GP surgery (All household members not registered with a GP locally)

Gender	Total	Nine Elms	Outside Nine Elms
Have not had time/not got round to it	33%	36%	24%
Prefer to visit my previous NHS GP	26%	20%	40%
Have not been ill	4%	4%	3%
Will be moving to another area soon	2%	1%	2%
Prefer to seek private treatment	13%	15%	8%
Difficulties registering at a local surgery	<0.5%	<0.5%	1%
Lack of appointments at local surgery	1%	1%	0%
Inconvenient surgery times	1%	1%	1%
Registered with an NHS GP near my place of work	1%	2%	1%
Other	21%	21%	20%
Unweighted Bases	**390**	**271**	**119**

6 Population Yield Matrices

Detailed population yield matrices can be derived by cross-tabulating survey information about age of residents with information about property size location and tenure.

Yield data is useful for projecting future changes in population which may result from new developments in the pipeline. This is particularly important when planning for the future and helps to assess the increased demand on local services as people move into new developments e.g. for doctors, schools, social infrastructure and public transport. The tables below show the average number of residents in each age band cross tabulated by the number of bedrooms. Versions are shown on a full sample base, for each location covered in this research and by each tenure type.

Table 25: Yield per dwelling –total sample

Average number of people within age group	Total	0	1	2	3	4
0-2	0.1	0	0.02	0.14	0.11	0.3
3-4	0.04	0	0.01	0.04	0.16	0.1
5-10	0.08	0	0.01	0.07	0.33	0.4
11-15	0.04	0	0	0.03	0.19	0
16-19	0.03	0	0.01	0.03	0.12	0
20-29	0.42	0.09	0.42	0.42	0.45	0.49
30-39	0.58	0.63	0.53	0.63	0.48	0.5
40-59	0.41	0.28	0.31	0.43	0.63	0.7
60-79	0.17	0	0.07	0.21	0.31	0.4
80+	0.01	0	0.01	0.01	0.02	0
Total	1.91	1	1.4	2.05	2.86	2.89
Unweighted Bases	**872**	**11**	**289**	**467**	**95**	**10**
Sample Base	**872**	**11**	**293**	**469**	**90**	**9**

Table 26: Yield per dwelling – Nine Elms

Average number of people within age group	Total	No. of beds				
		0	1	2	3	4
0-2	0.06	0	0.02	0.08	0.21	0
3-4	0.02	0	0.01	0.03	0	0
5-10	0.04	0	0.02	0.06	0.05	0
11-15	0.02	0	0	0.03	0.16	0
16-19	0.03	0	0.02	0.05	0	0
20-29	0.45	0.13	0.43	0.43	0.96	1.93
30-39	0.53	0.5	0.5	0.56	0.36	0.52
40-59	0.38	0.38	0.31	0.44	0.52	0
60-79	0.13	0	0.06	0.19	0	0
80+	0.01	0	*	0.02	0	0
Total	1.7	1	1.38	1.95	2.27	2.45
Unweighted Bases	**487**	**8**	**214**	**245**	**18**	**2**
Sample Base	**510**	**8**	**223**	**260**	**17**	**2**

Table 27: Yield per dwelling – Outside Nine Elms

Average number of people within age group	Total	No. of beds				
		0	1	2	3	4
0-2	0.15	0	0.01	0.21	0.09	0.38
3-4	0.06	0	0	0.04	0.19	0.12
5-10	0.14	0	0	0.09	0.4	0.5
11-15	0.06	0	0	0.04	0.19	0
16-19	0.04	0	0	0.01	0.14	0
20-29	0.37	0	0.4	0.4	0.32	0.12
30-39	0.66	1	0.63	0.73	0.51	0.5
40-59	0.46	0	0.32	0.42	0.66	0.87
60-79	0.23	0	0.08	0.23	0.39	0.5
80+	0.01	0	0.03	*	0.03	0
Total	2.21	1	1.47	2.17	3.01	3
Unweighted Bases	**385**	**3**	**75**	**222**	**77**	**8**
Sample Base	**362**	**3**	**71**	**209**	**72**	**8**

Table 28: Yield per dwelling – Owner occupiers

Average number of people within age group	Total	No. of beds				
		0	1	2	3	4
0-2	0.08	0	0	0.11	0.07	0.28
3-4	0.03	0	0	0.03	0.07	0
5-10	0.03	0	0.01	0.03	0.07	0.28
11-15	0.01	0	0	0.01	0.07	0
16-19	0.01	0	0.01	0.02	0	0
20-29	0.27	0	0.21	0.29	0.29	0.14
30-39	0.55	0.5	0.64	0.55	0.38	0.57
40-59	0.47	0.5	0.36	0.48	0.66	0.57
60-79	0.33	0	0.13	0.34	0.64	0.57
80+	0.02	0	0	0.03	0	0
Total	1.85	1	1.4	1.92	2.3	2.42
Unweighted Bases	**346**	**2**	**81**	**213**	**43**	**7**
Sample Base	**347**	**2**	**82**	**215**	**41**	**7**

Table 29: Yield per dwelling -Shared owners

Average number of people within age group	Total	No. of beds				
		0	1	2	3	4
0-2	0.14	0	0.02	0.29	0	0
3-4	0.05	0	0.02	0.08	0	0
5-10	0.08	0	0.02	0.16	0	0
11-15	0.04	0	0	0.1	0	0
16-19	0.03	0	0	0.08	0	0
20-29	0.21	0	0.13	0.34	0	0
30-39	0.8	0.8	0.66	0.97	0	0
40-59	0.46	0.2	0.56	0.37	0	0
60-79	0.01	0	0	0.03	0	0
80+	0	0	0	0	0	0
Total	1.83	1	1.42	2.42	0	0
Unweighted Bases	**88**	**5**	**45**	**38**	**0**	**0**
Sample Base	**84**	**5**	**43**	**36**	**0**	**0**

Table 30: Yield per dwelling - Renters

Average number of people within age group	Total	No. of beds				
		0	1	2	3	4
0-2	0.1	0	0.03	0.15	0.16	0.51
3-4	0.04	0	0.01	0.03	0.25	0
5-10	0.12	0	0.01	0.11	0.57	0.51
11-15	0.06	0	0	0.05	0.29	0
16-19	0.05	0	0.02	0.05	0.23	0
20-29	0.57	0.26	0.59	0.54	0.59	1.98
30-39	0.58	0.49	0.45	0.69	0.57	0.51
40-59	0.36	0.26	0.22	0.41	0.59	0.51
60-79	0.07	0	0.06	0.1	0.04	0
80+	0.01	0	0.02	0	0.04	0
Total	1.99	1	1.4	2.14	3.4	4
Unweighted Bases	**413**	**4**	**157**	**201**	**49**	**2**
Sample Base	**417**	**4**	**163**	**203**	**46**	**2**

7 Appendix: Statement of Terms

Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2008) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management ISO 27001:2013.

Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not publish any part of these results without the written and informed consent of the client.

Ethical practice

BMG promotes ethical practice in research: We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

With more than 25 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the public and the private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most up to date technologies and information systems to ensure that market and customer intelligence is widely shared.